



# Director's Review To Do List

- **Schedule & Milestones: needed - today**
  - a spreadsheet or text file with start and end dates for each phase of each deliverable
  - also include any major milestones: IDR, TDR, decisions between options...
  - distinguish between R&D funded phases and construction project
    - DOE: R&D vs construction
    - NSF: pre-MREFC vs MREFC
- **Scope Contingency: needed – Monday, Jan 11**
  - list of low-priority items amounting to ~10% of your base budget
  - make these simple to explain
- **Scope Opportunity: needed – Monday, Jan 11**
  - many of you have included this in your detailed spreadsheets
    - if not please send me a list (with costs)
- **Detailed Budget Spreadsheets: make sure they're up to date**
- **BoEs: make sure they're consistent with budget information**
- **Practice Talks**
- **Documents to review (see next slide)**
- **Anything else I've missed ???**



# Documents To Review

- DocDB access: <https://atlas-hllhc.docdb.bnl.gov/>
  - private: user=PMO ; pwd=\$4UG! - public: user=review ; pwd=p2-lhc
  - privately maintained docDB index
    - <http://pages.iu.edu/~hgevans/atlas/admin/protected/docdb/docdb-ph2.html>
    - user=atlas ; pwd=atlas-fyeo
- Please look over the following documents and point out any errors / suggest changes
  - Budget Documents
    - Cost Books: in docDB (#'s 56-73)
    - Summary Budgets: posted on this Indico
    - CORE cost spreadsheet: posted on this Indico
      - note: do NOT discuss CORE costs in your talks
  - WBS Dictionary: docDB #74
    - need to make the entries here a bit more consistent
  - L2 Risk Registry: docDB #77
    - Chuck has created this based on the contents of your BoEs
    - Risk Score Ranges: 1-3(low), 4-7(medium), 8-10(high)
- Project Execution Plan (NSF): posted to docDB soon
- First check to make sure that there are no obvious problems by: FRIDAY, JAN. 8



# Director's Review Structure

- Director's Review Web Page:
  - [http://www.usatlas.bnl.gov/HL-LHC/reviews/Director's\\_Review\\_Jan\\_2016/](http://www.usatlas.bnl.gov/HL-LHC/reviews/Director's_Review_Jan_2016/)
  - pwd for protected files: p2-lhc
- Committee has indicated that they want us to clearly address the charge items
  - and point out where in our documentation we address specific items
  - provide a “roadmap” of specific places in docs that answer the charge questions (?)
- Structure of Sessions/Presentations
  - L2 plenary talks: please keep to time
    - we will (try to) defer detailed questions to the Breakouts
  - Breakout Sessions (Management, Silicon, Calorimeters, Muon+TDAQ)
    - (1.5 hours on Jan.20 + 3 hours on Jan.21)
    - L2 Manager Overview: set structure of session
      - indicate when/where open questions from plenary will be addressed
    - Short presentation on R&D by L2 R&D manager
      - focus on accomplishment, goals to TDR, decision points
      - do not discuss budget (?) unless asked
    - Go through BoEs one by one (project baseline only)
      - refer to BoE as the starting point to answer any detailed question



# Charge Items

1. Design: Are the project's performance goals well motivated and understood? Is the conceptual design sound and likely to meet the project's performance goals effectively and efficiently? Are the technical approaches adequately justified in the conceptual design, Letter of Intent and related supporting documentation?
2. R&D: Is there an appropriate R&D plan in place that adequately supports ongoing design development and the down select of alternatives on the currently anticipated time scales?
3. Scope: Are the project's scope and specifications sufficiently defined to support the cost and schedule estimates? Have the scope and physics performance priorities been clearly identified? Are the scope designations and responsibilities for the NSF and DOE well defined?
4. Cost and Schedule: Are the cost and schedule estimates credible and realistic for this stage of the project? Has scope contingency been identified and integrated into the project plan? Do the estimates include adequate scope, cost and schedule contingency? Does the cost estimate include realistic assumptions of labor costs, M&S and anticipated support from the core research program?
5. Risk: Have risks been adequately identified for this stage in the project? Have they been appropriately taken into consideration in the determination of the cost, schedule and scope contingency estimates? Has the risk of possible funding and/or approval delays early in the project life cycle been properly taken into account? Does the R&D plan include mitigation of these risks where possible?
6. Management and ES&H: Is the project being effectively managed at this stage? Are the roles and responsibilities of the managers at all levels well understood by the principals? Do the management structure and processes effectively support the design effort? Are the criteria, processes, and timeframes for the major decisions concerning down selects, scope optimization, and assignment of activities well understood? Is the integration with International ATLAS well defined and understood? Has the rationale for the NSF and DOE roles been clearly articulated, and are they well motivated and optimized? Are ES&H aspects being properly addressed, and are the plans sufficient given the project's current stage of development?
7. Documentation: Is the documentation currently in place adequate to support the project plan, scope, and cost and schedule estimates being presented? If not, where are the deficiencies? Do the NSF CDR and NSF Project Execution Plan fulfill the NSF's expectations for conceptual design?



# Possible Charge Roadmap Example

## 1. Design:

- Are the project's performance goals well motivated and understood?
  - sources: Evans presentation, PEP – ch.1, Scoping Doc – ch.XI
- Is the conceptual design sound and likely to meet the project's performance goals effectively and efficiently?
  - sources: L2 presentations, Scoping Doc – ch's III-VI
- Are the technical approaches adequately justified in the conceptual design, Letter of Intent and related supporting documentation?
  - sources: Scoping Doc – ch's III-VI

## 2. R&D:

- Is there an appropriate R&D plan in place that adequately supports ongoing design development and the down select of alternatives on the currently anticipated time scales?
  - sources: Evans & L2 presentations, R&D presentations in breakouts, PEP – ch.3, Scoping Doc – ch's III-VI